Chapter 9

Create a New Lead

9-1. General.

a. Getting new leads is vital to your success in your job. The most important things you do in ARISS are create new leads records and then track and retrieve lead information, both of which are critical for mission accomplishment. Remember that you have seven different sources routinely sending you leads which you will receive during replication. As we discussed in chapter 6, the status of a record is based on what juncture of processing the lead is at.

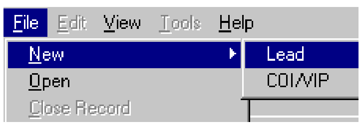
b. The following steps will show you how to create a new lead record:

(1) Open a new lead record.

(2) Capture required information.

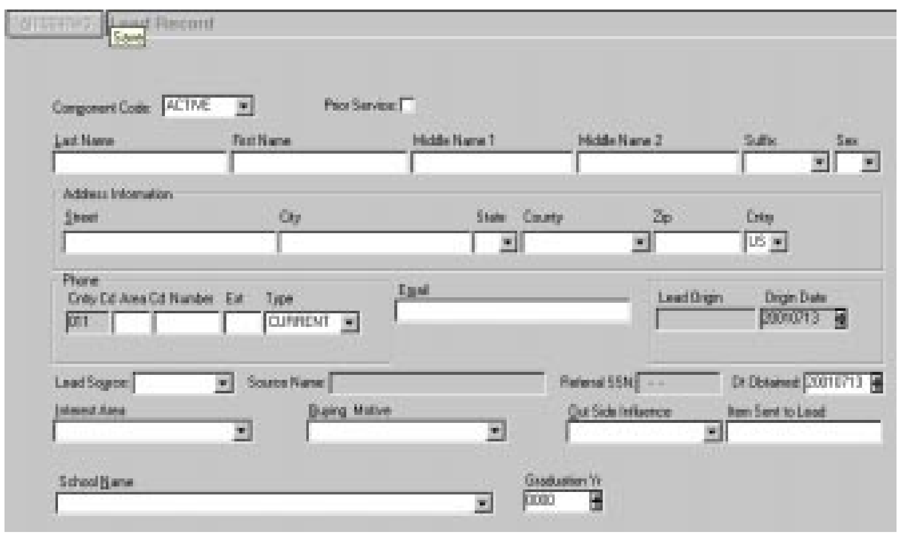
(3) Update contact history.

9-2. Open a new lead record.



a. You begin a new lead record by clicking **Lead** under **File** and then click on **New** or click on the **Open Folder** icon.

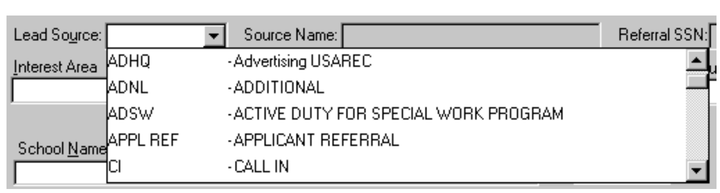
b. This is a new **Lead Record**. Review the blank windows to see what information you'll be responsible for entering. Remember, in order to create a new lead, the minimum amount of information you need about the person is name, address and/or telephone number, sex, and lead source. Also note the **Component Code** will default to the recruiter's role (i.e., **ACTIVE** for RA and **RESERVE** for USAR).



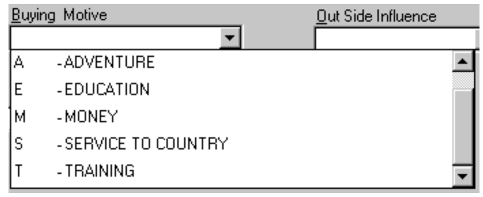
✓ Before you create a new lead make sure that you check your Find screen to ensure that this lead was not provided by another source. This will eliminate unnecessary duplicate records.

9-3. Capture required information.

a. In this example, your new lead's name is Kevin Williams. Review the basic information that you will have to enter. Now take a close look at the selections under the **Lead Source** drop-down arrow. This is where you need to log what method was used to generate this lead.

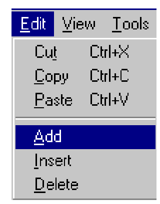


b. If Kevin has expressed a special area of interest, such as being a warrant officer, you will enter that information in the **Interest Area** window. Click the **Interest Area** drop-down arrow to see the special areas available. You can see there are three interest areas. If Kevin did not specify a special interest, leave the space blank.

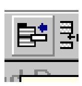


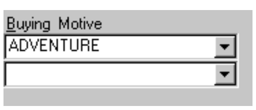
c. Now you need to record his buying motives. Click the **Buying Motive** drop-down arrow to see the different options. In this case, during your telephone conversation Kevin mentioned he is interested in college and watching action movies. You can use this information to focus your sales message on important areas related to his interests.

d. **ADVENTURE** is one of the **Buying Motives** listed, so click on **ADVENTURE**. **ADVENTURE** should now be listed as his **Buying Motive**. Kevin also mentioned a friend of his who is currently in the Army. His friend has told them what a great feeling he has serving his country. His respect for this friend and ideals are also a buying motive.



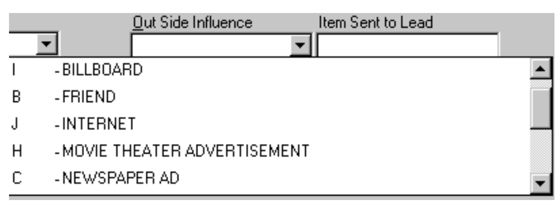
e. You need to add another line to input the additional **Buying Motive**. To add another line you can click **Edit** and then **Add** on the menu bar or you can click on the **Add Row** icon.





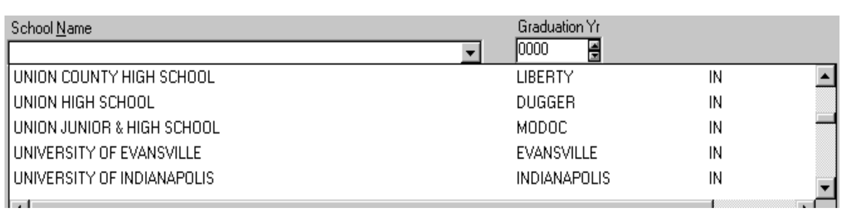
f. Notice under **Buying Motive**, there is a second window with a drop-down arrow. Click the down arrow by the newly added **Buying Motive** window. Click on **SERVICE TO COUNTRY** as his second **Buying Motive**. You can enter up to five buying motives for a prospect.

g. Remember the next time you speak to Kevin that those buying motives are powerful motivators that could influence his decision to enlist.



h. Now let's record an outside influence if there is one. An outside influence can be almost anything or anyone that brings a lead to you. During your telephone conversation with Kevin, he mentioned a friend in the Army and that he called you, because of things his friend told him about how great the Army is. Therefore, Kevin's friend is his **Out Side Influence**. Go ahead and click on the drop-down arrow and select **FRIEND** as Kevin's **Out Side Influence**.

i. You are almost finished creating a new Lead record. All that you need to do is complete Kevin's school information. To record the school, click the **School Name** drop-down arrow. ARISS will populate this list with schools, colleges, universities, and vocational-technical institutes within the United States. You know Kevin is a senior at a local HS. Schools are listed alphabetically by State. You will need to scroll to the appropriate State and then to the



school. Click on a school. You will notice that you cannot type anything in this box. There are several reasons, but understand that this list is used to establish standard naming conventions that will allow you to complete queries. This has been set by USAREC and if you find a missing or incorrect school, notify your chain of command so the appropriate change can be made. Since Kevin is a senior graduating this year, select the current **Graduation Yr**. This date can either be entered by highlighting the box and typing or by using the up and down arrows to select a date.

9-4. Update contact history. Now that you have completed the Lead record, all that's left to do is Save. If you think you are finished with this record, then maybe we need to go back and review chapter 6 about updating the contact history. You have worked hard to get this lead and we know this is not the end. During your conversation, you either identified that you would call him again or he has agreed to an appointment. Click on the **ARISS-RWS** tab and go to your **Contact History** screen and record today's action and show what and when your next action will be.

✔ It cannot be stressed enough that anytime you work on a record, conduct an appointment, etc., that you record your actions in Contact History. Your leadership has visibility of your actions when they review their reports from the TOS. Show credit for what you are doing and annotate the Contact History screen.

✔ You can replicate after you complete this record, wait until you do a projection, or at the end of the day before you leave the office. The best times to replicate are early morning or late afternoon when fewer recruiters are accessing the system.